

Ready, Set, Refresh!

Five Touchstones of a Culturally Successful Practice

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Agenda

- Introduction
- Purpose
- Five touchstones
- Application in practice
- Questions and answers



Who is DataGen, Inc. - Practice Advancement Strategies



Practice Advancement Strategies (PAS)

- 15+ years experience
- Representing 100's of practices nationally
- Primary and specialty care and various compositions
- Transformation and VBP
- Consulting and workflow redesign



Patient Centered
Medical Home
(PCMH)



Patient Centered
Specialty Practice
(PCSP)



Behavioral Health
Distinction (BH)

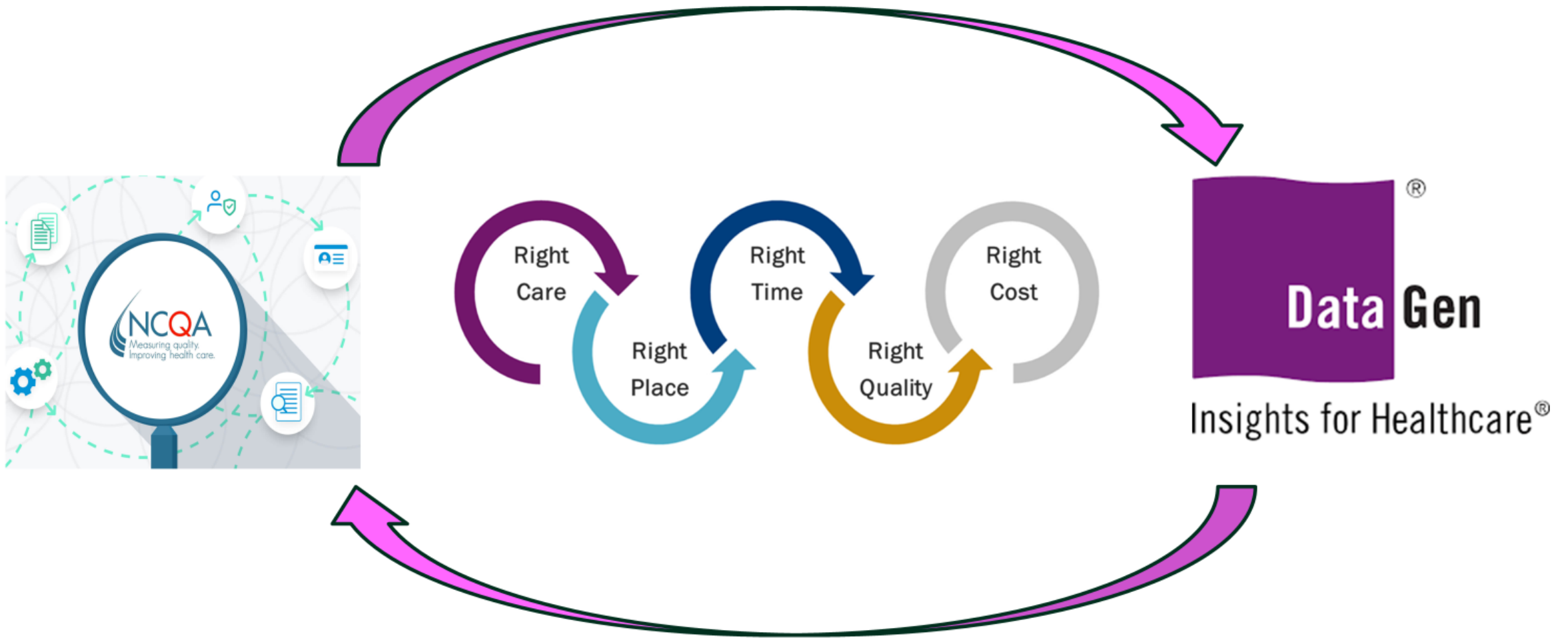


Health Equity
Accreditation
(HEA)



Health Equity
Accreditation Plus
(HEA+)

Symbiotic Relationship



Why is PAS Different?

- Hands on approach
- Pseudo staff member/liaison
- Resource and tool library
- Ongoing trusting relationships
- Never “*check the box*”
- Change management



Poll:

- Who do we have joining us today?
 - Physicians/Clinicians
 - Practice managers/Administrators
 - Office staff
 - C-Suite
 - Other...



Purpose



Key Take Aways:

- Understand the need to reset to positively impact practice wellbeing
- Explore pillars of a practice culture and how to bolster team dynamics out outcomes
- Apply learnings to goals, maturation, and mission



Keep the Plates Spinning...



If Plates Fall...



Reinforcing Our Core



Real Quote

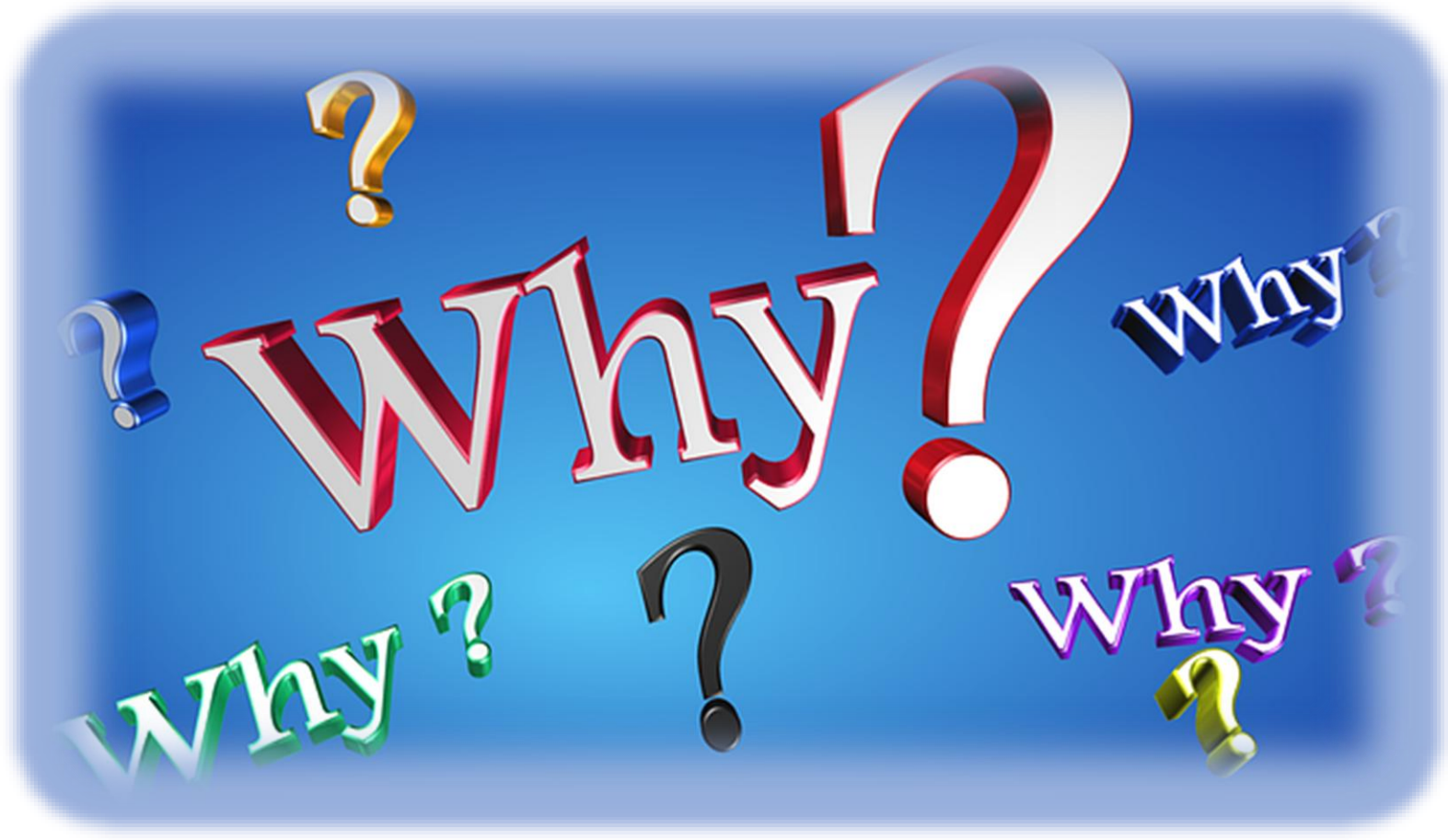
- “Mandi, this is all *fluff*, when do we get down to the actual work.”



Five Touchstones



Poll:





1. Vision Transparency

- Leadership
- Messaging
- Clear goals
- Communication
- Proactive



Communication Plan

Purpose: To continually keep team engaged, mindful of reason we do what we do daily, and provide a safe space for free conversation, idea generation, and concern sharing.

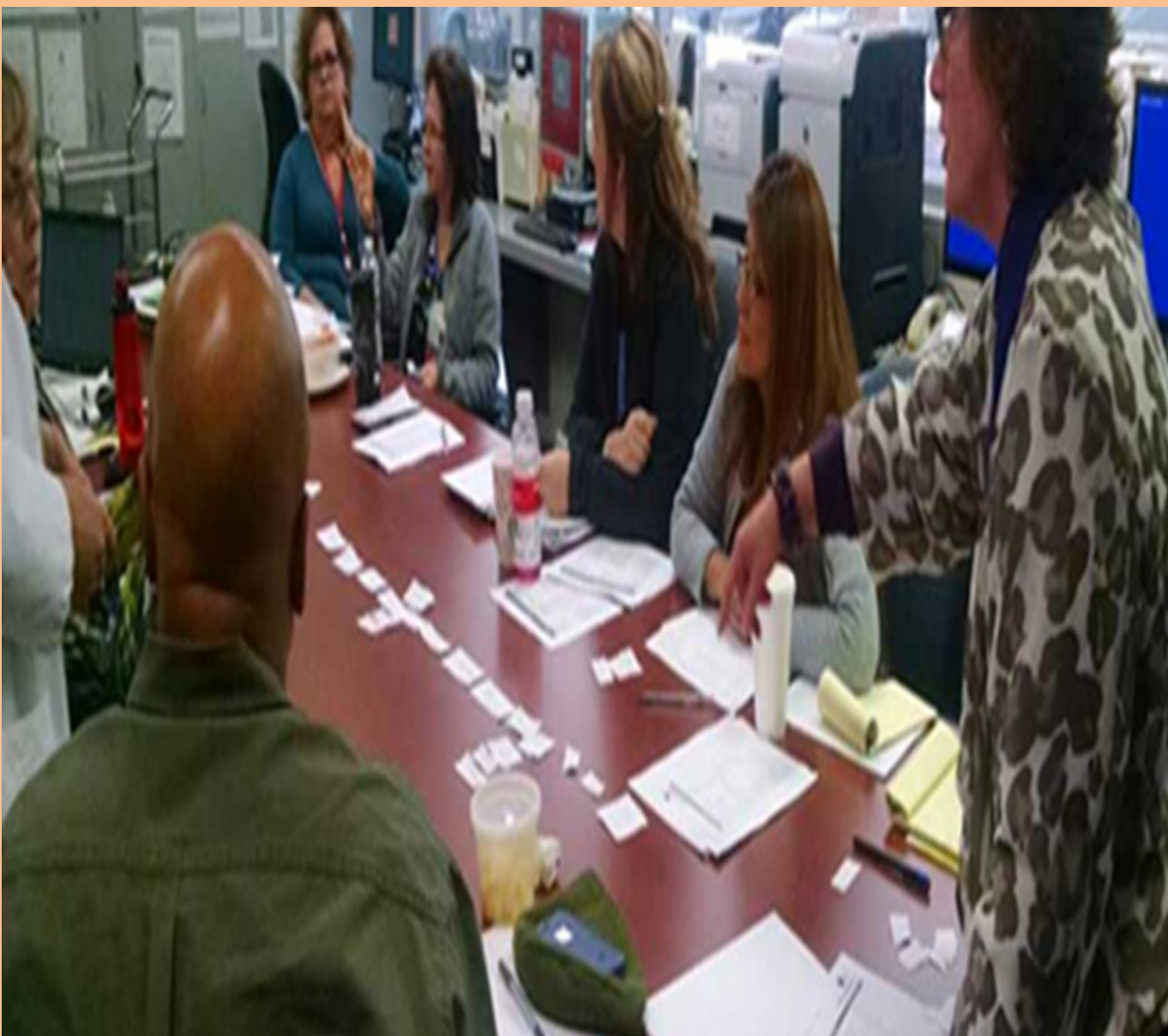
Title	Reason	Frequency	Owner	Place	Follow Up
Quality Improvement Team Meeting	Discussion around current clinical measures, statistics, goal setting, and interventions	1 st Monday of March, June, September, and December at 3pm	Dr. James Reynolds and Abbie Turner	ZOOM link and Conference room 1B	Agenda, Minutes posted on shared drive within two business days
Quality Improvement Postings	To continually share with staff and patients the progress of the practices	Monthly updates	Abbie Turner	Posting in all staff rooms and waiting rooms	Email to Abbie with questions/comments
Operational Update – All Hands-On Deck	Leadership talks to the entire team regarding goals and progress.	Every 6 months with Ad-Hoc meetings as needed	Henry Bluefield MD and Jenna Richards RN	ZOOM link and Conference room 1A/1B	Agenda, Minutes posted on shared drive within two business days



2. Do It WITH Them, Not TO Them

- Address barriers
- Generate buy-in
- Cultivate accountability
- SME voice
- Growth and education





Team Based Care – Staff Responsibilities/Transformation Leads (at onboarding and annually)	Office Manager
Team Based Care – Patient Centered Care Team Meetings	Office Manager
Team Based Care – Quality Improvement	Office Manager/Quality Committee
Team-Based Care – Provide Medical Home Information to Patients	Population Health Analyst/ Office Managers
Knowing and Managing Your Patients – Manage Problem List	Care Team
Knowing and Managing Your Patients – Comprehensive Health Assessment	Care Team
Knowing and Managing Your Patients – Depression/Behavioral Health Screenings	Care Team
Knowing and Managing Your Patients – Diversity/Language	Population Health Analyst
Knowing and Managing Your Patients – Identify Needs of Population/Health Literacy and Cultural Competence Education	Office Manager/ Pop. Health Analyst (reporting)
Knowing and Managing Your Patients – Proactive Outreach	Quality & Data Analytics Manager
Knowing and Managing Your Patients – Medication Reconciliation and Maintaining Up-to-date Medication List	Care Team
Knowing and Managing Your Patients – Clinical Decision Support	Medical Director/ IT Support
Knowing and Managing Your Patients – Connecting with Community Resources	Population Health Analyst/ Office Managers
Patient Centered Access – Patient Access to the Practice/Same Day Appointment Availability	Office Manager/ Director of Primary Care Services
Patient Centered Access – Appointments Outside of Business Hours	Office Manager/ Director of Primary Care Services
Patient Centered Access – Timely Clinical Advice (documentation and monitoring) – including electronic (portal) messages	Office Manager/ PCMH Coordinator



3. Perception vs. Reality

- View of the practice
 - Multiple key areas
- Data integrity
- Honest conversations



What Do We THINK...

What Do We KNOW...

...our patients are saying?

...our top documented conditions are?

...our team feels daily?

...we document consistently and accurately?

...our technologies can do for us?



What does
this activity
produce?





4. Get Comfortable with the Uncomfortable

- What are we leaving on the table?
- Meaningful and manageable
- Exploring prospects
- Incremental improvements





For 2 years,
documentation
of current
medications
has been at
96 - 98%

Continual
gaps remain
open when it
comes to
diabetic
follow up

Clinical staff
struggling to
collect all
components to
complete
visits/charts

Patient
survey results
are declining
in
participation
and in
satisfaction

Visit
no- shows
are on the
rise



5. Add Sparkle to Everyday

- Celebrate
- Staff call outs
- Opportunities from bumps in the road
- Story telling





QUESTION	REPLIES	ACTIONS
Tell us about your overall experience today in our practice?	• Excellent • Staff is great • I look forward to future care with this new site • Love the nurse and doctor • Always able to get an appt • Love Kathleen and Katie • Love Andrea • Friendly	• We will continue to praise the team as many are so happy with the kindness and customer service we provide!! • Special shoutouts to Kathleen, Andrea, and Katie! • Starbucks G/Cs handed out

Application



Remember to...

- Know your why
- Take the temperature of:
 - Finances
 - Culture
 - Technology
 - Outcomes
- Refresh at least annually
 - Conversation and tools
- Think about changes and progress
- Stay organized



Playbooks

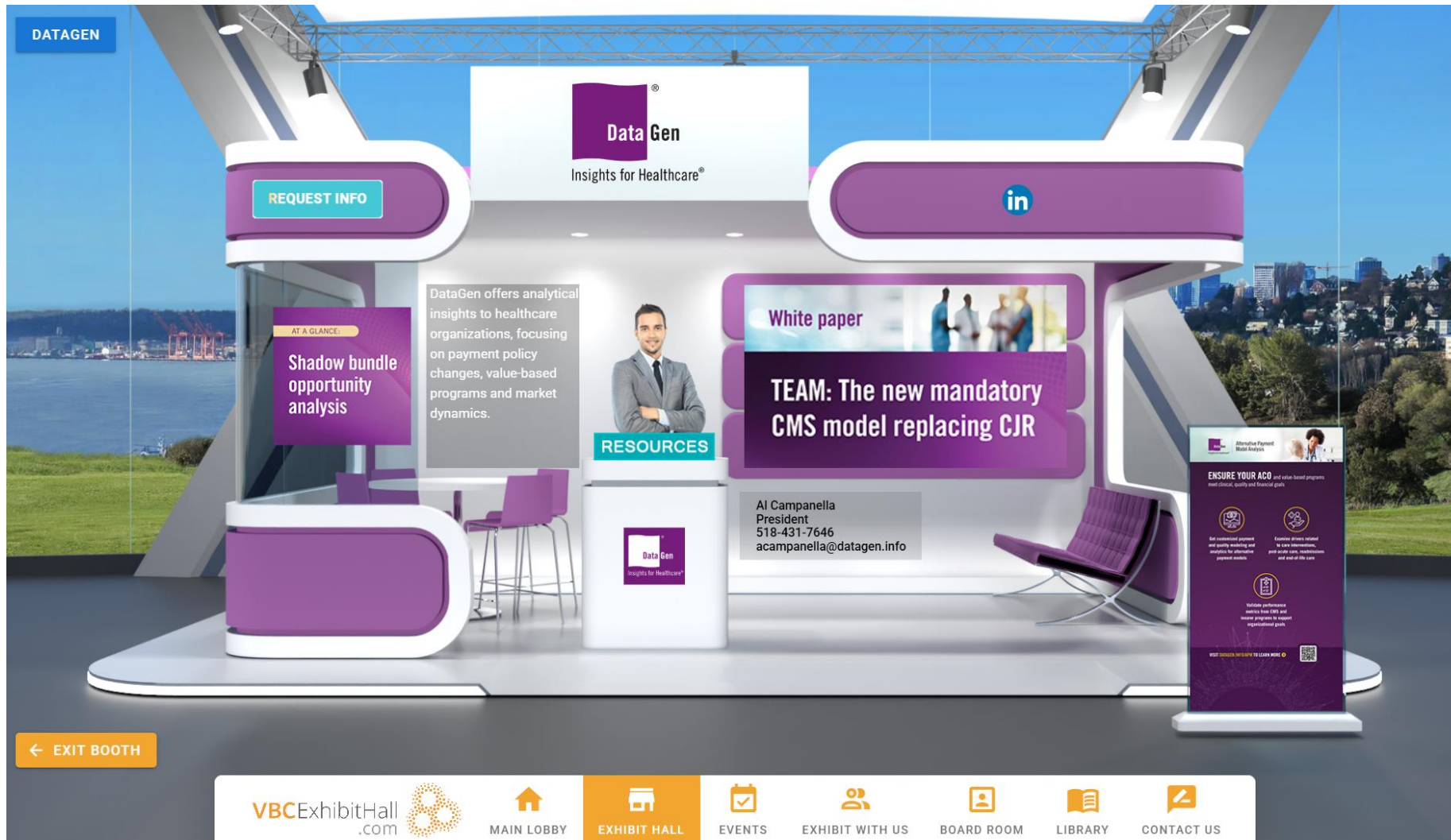
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Policy Name(s)	Revision Date	Owner	NOTES	Reports/Workflows	WHY are we performing this?	How Often? (Based on our Policy)	Where is this Report Run From or Where Does the Documentation Take Place?	Owner	NOTES
Access and Continuity	12.2024	Jen - Practice Admin		Same Day Access Screen Shot Proof	Are there available same day slots for scheduling sick and well visits daily to avoid ED/Urgent Care use? Can we assess the usage of the placement of the slots?	Annually	EPIC	Eric -Lead Reception	
Clinical Advice	12.2024	Jen - Practice Admin		3rd Next Available Report	Are scheduling standards in our policy being met per appointment type to reduce leakage and increase satisfaction?	Quarterly	EPIC	Eric -Lead Reception	
Patient Preferences Impacting Access	12.2024	Jen - Practice Admin		Continuity Report	Are patients being scheduled with their PCP of record 80% of the time to build trust?	Quarterly	EPIC	Eric -Lead Reception	
				Clinical Advice Reply Rates by Phone (during and after hours) and Portal and documentation	Are calls and messages being documented and replied to as per our policy to support coordination, timely care and avoidance of ED/Urgi?	Annually	Manual Audit	Jen - Practice Admin	
				How do patients know about after hours offerings?	Do we avoid likelihood to use ED/Urgent Care settings with communication and postings?	Quarterly	Manually review of practice signage and materials	Jen - Practice Admin	
				Patient Feedback on Access Report	Do we collect and aggregate patient feedback on access and apply to QI PDSA?	Monthly	Survey Monkey Results	Althea - Patient Coordinator	

Questions & Answers



Stop by our VBCExhibitHall.com Virtual Booth



Thank you.



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Appendix:

- **Practice Advancement Strategies - Articles:**

- https://news.datagen.info/2025/08/ncqa-2026-pcmh-updates-annual-reporting.html?_gl=1*1cwvmth*_gcl_au*MTU1NzkzMjkxNy4xNzU0NDkxMDA1*_ga*MTEwMjg3NTgwNy4xNzU0NDkxMDA1*_ga_54FP5QFF7C*czE3NTg3NDk5ODMkbzMkZzEkdDE3NTg3NTAwNDEkajlkBDAkaDA.
- https://news.datagen.info/2025/06/nys-pcmh-enhanced-payment-update-2025.html?_gl=1*gu3ugn*_gcl_au*MTU1NzkzMjkxNy4xNzU0NDkxMDA1*_ga*MTEwMjg3NTgwNy4xNzU0NDkxMDA1*_ga_54FP5QFF7C*czE3NTg3NDk5ODMkbzMkZzEkdDE3NTg3NTAwNDgkajYwJGwwJGgw
- https://news.datagen.info/2025/05/social-care-networks-ny-1115-waiver.html?_gl=1*pog8jm*_gcl_au*MTU1NzkzMjkxNy4xNzU0NDkxMDA1*_ga*MTEwMjg3NTgwNy4xNzU0NDkxMDA1*_ga_54FP5QFF7C*czE3NTg3NDk5ODMkbzMkZzEkdDE3NTg3NTAwODQkajl0JGwwJGgw

- **Practice Advancement Strategies - Linked In:**

- <https://www.linkedin.com/in/mandi-diamond-pcmh-cce-40526919/>
- <https://www.linkedin.com/groups/14702005/>
- <https://www.linkedin.com/company/datagen-healthcare-analytics/posts/?feedView=all>